



Education  
Funding  
Agency

# 16 to 18 Residential Bursary Fund

Guide for the 2014 to 2015 academic year

April 2014

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## Introduction

1. This guide provides information to all institutions receiving 16-18 Residential Bursary Fund (RBF) allocations in the 2014 to 2015 academic year. It sets out the requirements for the administration of the funding and describes how the Education Funding Agency (EFA) will collect monitoring information for the scheme.
2. Institutions are reminded that they must ensure RBF expenditure is appropriate and in line with the scheme rules set out in this guide. RBF may only be used to support accommodation cost for residential students and to support travel between the student's term time lodgings (if they live off site) and the institution. It must not be used for hardship or to provide help with childcare costs.

## A summary of the Residential Bursary Fund in 2014 to 2015 academic year

3. RBF provides financial help towards the costs of accommodation for young people attending one of the designated institutions delivering specialist provision, where that provision requires the young person to be resident in order to participate because it is not available locally and/or because it requires students to be available at unsociable hours on a regular basis. RBF enables young people to achieve a qualification in a specialist subject they would not be able to obtain at a non-specialist institution.

4. RBF provides a contribution towards residential costs for those young people the institution identifies face the most significant financial barriers to participation. It is not intended to provide support to all young people on residentially delivered provision at an institution; nor is it intended to necessarily cover the full costs for each student.

5. RBF should be used to help young people with the costs of accommodation whilst they are in education; the accommodation may be owned or managed by the institution or be owned by a private landlord. It is anticipated that the majority of RBF funding will be used to cover accommodation costs, however, RBF may also be used to help with travel costs between the young person's term time lodgings and the institution where appropriate. The use of RBF for travel costs for non-residential students is not permitted.

6. Where institutions use RBF for travel costs, these should not exceed 15% of their total RBF allocation. In order to ensure RBF maintains its' primary focus on residential support, travel expenditure is also capped at £25,000. In other words, where 15% of the institution's allocation is greater than £25,000, £25,000 is the maximum the institution may spend on travel costs. If institutions face exceptional circumstances in which they feel that a greater level of travel expenditure is required, they should submit a business case to the EFA (by e-mail to [jayne.lievesley@education.gsi.gov.uk](mailto:jayne.lievesley@education.gsi.gov.uk))

7. Institutions are permitted to use up to 5% of their allocation for administrative costs.

8. In previous years, the EFA permitted institutions to report any 'other' spend from RBF in the end of year data return. 'Other' spend was rarely reported and any such usage was at very minimal levels. The end of year data return for the 2012 to 2013 academic year, however, highlighted a small number of institutions that appeared to using RBF for spend more appropriate to the 16 to 19 Bursary Fund, i.e. for other course related costs such as books and equipment or for more general student hardship costs. To avoid any further confusion for institutions, no 'other' spend category will be in place for future data returns and institutions must ensure that any such spend is taken from the 16 to 19 Bursary Fund.

## **Residential Bursary Funding and other forms of financial support**

9. Young people who are receiving support from RBF may also receive support from the 16 to 19 Bursary Fund for the costs of meals, books, equipment or other course costs including travel from home to the institution.
10. Students who require help with childcare costs should be guided to apply for support from the Care to Learn scheme.
11. Institutions are not permitted to vire funds between RBF and the 16 to 19 Bursary Fund. No virement of funds is permitted between RBF and any adult discretionary learner support funds allocated to the institution by the Skills Funding Agency.
12. Institutions are reminded that students attending institutions with an RBF allocation are not eligible to apply for support from the nationally administered Residential Support Scheme (RSS).

## Student eligibility

13. To be eligible for RBF in the 2014 to 2015 academic year, a young person must be aged at least 16 and under 19 on 31 August 2014. Where a young person turns 19 during their programme of study, they can continue to be supported to the end of the academic year in which they turn 19 or to the end of their programme of study, whichever is sooner.
14. Young people on waged Apprenticeship programmes, or any education or training where a wage is being drawn, are not eligible to apply for RBF support.
15. The young person must also satisfy the residency criteria set out in the [2014 to 2015 academic year EFA Funding Guidance](#).

## Allocations to institutions

16. Allocations are made to institutions to manage at their own discretion but in line with this guide. Allocations for the 2014 to 2015 academic year are based on actual expenditure at each institution over a two year period and an assessment of trends over the same period. This allows us to reflect actual activity at each institution and offset in-year anomalies as far as possible.

17. Institutions who are made an allocation for RBF are responsible for:

- Staying within budget (although they may choose to top-up the RBF budget from their own sources)
- Paying out funds to contribute to the residential costs for young people who meet the criteria for support
- Reporting any anticipated underspend to the EFA
- Completing the Individualised Learner Record (ILR) to report students receiving residential support (and inform future allocations) and providing minimal additional Management Information to the EFA on an annual basis (usually by the end of October for the previous academic year) on student numbers, awards and expenditure.

18. Institutions may use up to 5% of their RBF allocation to cover administrative costs. The EFA would like to remind institutions that the 5% administrative costs are part of their allocation total; they are not an additional 5% on top of the allocation total.

19. Where institutions identify that they will be unable to spend the majority of their RBF allocation, they should notify the EFA as soon as possible to arrange to repay the excess. The EFA will aim to distribute any returned funds to other institutions that can make use of further funding. The EFA may also recover funds from institutions which are undistributed at the end of the academic year.

Email: [ResidentialSupport.EFA@education.gsi.gov.uk](mailto:ResidentialSupport.EFA@education.gsi.gov.uk)

20. The EFA cannot guarantee to reimburse any overspends by institutions as this is dependent on funds becoming available for recycling; institutions are therefore advised not to overspend in the expectation that there will be a reallocation of funds later in the year. The EFA will not reimburse any overspend that is not within the scheme rules as set out in this guide and may take action to recover any RBF funds spent outside the scheme rules.

## Assessment and payment of RBF

21. Institutions have the discretion – in line with this guide - to determine which young people receive RBF support and how much support they should receive. Institutions should manage the number and size of RBF awards to keep within their budget, targeting available funds towards those facing the most significant financial barriers to participation.

22. Institutions should assess the young person's actual need for help with residential costs before determining whether to award RBF support. RBF should not routinely be awarded simply because a student is enrolled in residentially delivered provision. Institutions may decide to take account of the young person's household income as evidenced by receipt of benefit and/or P60, Tax Credit Award Notice or evidence of self-employment income before awarding RBF.

23. RBF payments for accommodation should be made directly to the young person's landlord (which may be the institution itself if they provide accommodation directly or to a private landlord) for accommodation costs and not directly to the young person for living costs (which would be subject to the Social Security Amendment (Students and Income-related Benefits Regulations 2000). Receipt of other benefits and/or financial support does not exclude a young person from receiving help with residential support if he/she is experiencing financial difficulties in meeting the costs associated with education.

24. Institutions may wish to consider retaining a contingency fund to respond to needs which emerge later in the academic year in response to changes in a student's circumstances rather than allocating all funds at the start of the year.

25. Institutions who use RBF to support students travel costs from their term time lodgings to site (up to the maximum of 15% of their allocation, capped at £25,000) should note that funding daily travel costs should only be considered as a last resort and that the use of RBF to help meet transport costs does not replace the statutory duty on local authorities to set out (in an annually published transport statement) the arrangements they will make to facilitate the participation in education or training of young people of sixth form age.

26. RBF should not be used by an institution for any purpose designed to give them a competitive advantage over other institutions; nor should RBF be used for:

- Enrolment or administration fees
- Fees for access to college facilities
- Block subsidy of transport
- Costs that are in the scope of the 16 to 19 Bursary Fund



- Childcare costs that are in the scope of the Care to Learn scheme

27. In determining arrangements for payment of RBF, institutions are subject to equalities legislation, which means they must not discriminate against their students on the basis of their protected characteristics. They are also subject to the public sector equality duty in section 149(1) of the Equality Act 2010.

28. If a young person is unhappy about the way in which their request for RBF support is handled they should follow the institution's normal complaints procedure.

## Governance and monitoring

29. Institutions should maintain accurate and up to date records to evidence which students receive RBF funding; confirm student eligibility for funding and demonstrate appropriate use of funds.

30. The administration and allocation of RBF is subject to the institution's normal governance and audit regimes. RBF funding is also subject to assurance as part of the normal assurance arrangements for 16 to 19 education and training. Institutions should note that, following an audit, funding may be recovered where RBF payments are found not to have been made in accordance with this guide.

31. Institutions should complete the Individualised Learner Record (ILR) to indicate the numbers of students receiving residential support. The EFA will use this information in developing future allocations.

32. The EFA will also request minimal Management Information (MI) to support its monitoring of RBF and to inform future year's allocations. The information which is required for the 2014 to 2015 academic year is as follows:

### **Accommodation:**

- institutions to supply the number of awards made and/or the number of students supported
- institutions to state the total amount spent

### **Daily travel** (where the young person's term time lodgings are not on site):

- institutions to supply the number of awards made and/or the number of students supported
- institutions to state the total amount spent (up to 15% of the allocation, capped at £25,000)

### **Admin costs:**

- institutions should state how much of their allocation (up to 5% of the allocation) has been spent on administrative costs.

33. The EFA will issue more details about the MI collection in advance of the return being due in October 2015.

34. As set out in the 2013 to 14 academic year guide, institutions should note that the EFA will also be requesting this data for their 2013 to 2014 academic year RBF allocation. The arrangements for collecting this data – which will be due in October 2014 – will be communicated separately.

## Further information

35. Institutions should direct any queries about the allocation and administration of RBF to [residentialsupport.EFA@education.gsi.gov.uk](mailto:residentialsupport.EFA@education.gsi.gov.uk)



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